

IT Portfolio Management

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Portfolio Management

- **What It Is**
- **Why We Are Doing It**
- **How We Are Doing It**

What is Portfolio Management

The Methodology and Processes
Used to Ensure That the Limited
Resources Available for
Information Technology Provide
the Most Value to the Organization

Why Should We Do This?

- Limited Staffing Resources
- Limited Funds
- Ensure Executive Sponsorship
- Ensure Enterprise Approach

Levels of Portfolio Management

- IT Projects
- Production Systems
- IT Enhancements



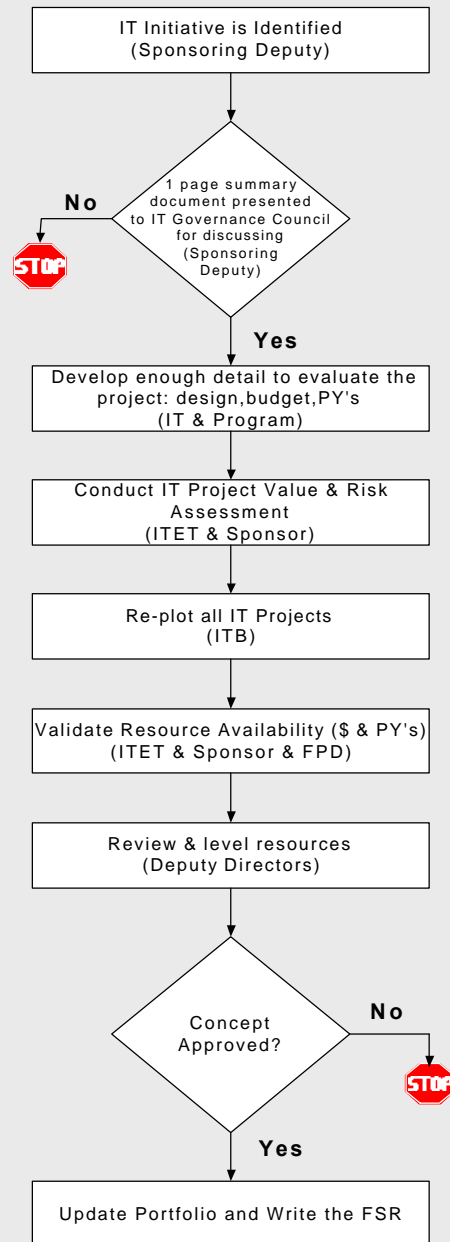
Phase I - Project Portfolio

- Easiest to Implement
- Provides Value to Non-Agency Stakeholders
- Most Urgent Need

Tools For Phase I

- Concept Paper
- Value/Risk to the Business Analysis
- Fiscal Analysis
- Staffing Resource Availability

Project Initiation Process



Concept
Phase

Value/Risk
Analysis

Resource
Analysis

Commitment
Phase

FSR Phase

Value Assessment

ENSURES BUSINESS CONTINUITY	MEETS STAKEHOLDER EXPECTATIONS	FURTHERS ALL EDD PROGRAMS' MISSIONS	PROVIDES BUDGET SAVINGS /REVENUE GENERATION/ COST AVOIDANCE	FURTHERS IT ENTERPRISE ARCHITECTURE VISION
<ul style="list-style-type: none"> • Program Services would not stop or fail. • Replaces aged technology that cannot be supported or maintained. • Reduces risk of system failure. • Establishes & extends a secure, reliable infrastructure 	<ul style="list-style-type: none"> • Local • State • Federal • Elected Officials • Federal or State Mandates • Customers 	<p>With emphasis on the following:</p> <ul style="list-style-type: none"> • This area lists each of the specific areas in our department mission statement 	<ul style="list-style-type: none"> • Administrative savings • Benefits savings (trust fund) • Revenue generation (tax collection, benefit OP establishment & collection) • Cost avoidance 	<ul style="list-style-type: none"> • Build reusable, scalable solutions (HW &/or SW)
0 – 6	0 – 3	0 – 4.5	0 – 3	0 – 3

Value Assessment

Project Name	Ensures Business Continuity Score x 2 <i>(Make sure enter double score)</i>	Meets Stakeholder Expectations	Furtheres All EDD Programs' Mission Score x 1.5 <i>(Make sure enter score x 1.5)</i>	Provides Budget Savings/Revenue Generation/Cost Avoidance	Furtheres IT Enterprise Architecture Vision	Total
A	2	1	3.0	2	3	11.0
B	6	1	3.0	2	3	15.0
C	4	2	3.0	1	2	12.0
D	0	1	4.5	3	1	9.5
E	6	3	3.0	2	3	17.0
F	4	3	4.5	1	3	15.5
G	2	0	3.0	3	2	10.0
H	2	0	1.5	1	3	7.5
I	0	3	4.5	3	3	13.5
J	6	2	3.0	3	3	17.0
K	4	2	4.5	2	3	15.5
L	0	2	1.5	3	2	8.5
M	4	3	4.5	1	1	13.5
N	6	1	3.0	2	3	15.0
O	0	2	4.5	1	0	7.5

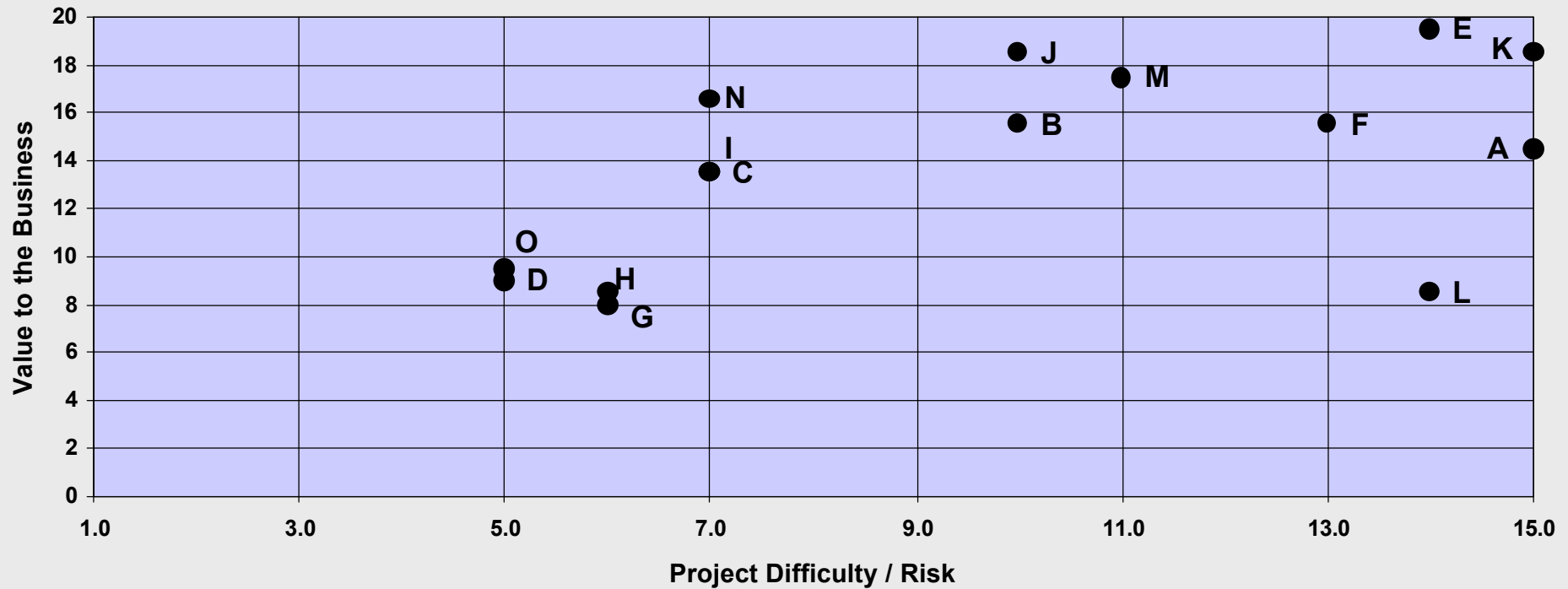
This chart is for illustrative purposes only and does not reflect any specific initiatives within the EDD

Risk Category and Assessment

Project Name	Project Size	Project Manager Experience	Team Experience	Project Type	New Technology	Computation of the Overall Project Rating
A	1	2	3	2	3	11
B	3	1	2	2	2	10
C	2	1	3	2	2	10
D	1	1	1	1	1	5
E	3	3	2	1	3	12
F	2	3	2	3	2	12
G	1	2	1	1	1	6
H	1	2	2	1	1	7
I	2	2	12	1	1	18
J	3	1	1	3	2	10
K	3	2	3	2	3	13
L	3	3	3	3	2	14
M	2	3	2	1	2	10
N	1	1	2	2	1	7
O	1	2	1	2	1	7

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IT Project Prioritization



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Funds Available for IT Projects

SFY 2003 - 2004

Project	First Funding Stream	Second Funding Stream	Third Funding Stream	Fourth Funding Stream	Fifth Funding Stream	Sixth Funding Stream
Funds Available for Projects (Dollars in Thousands)	\$50,000	\$5,000	\$2,000	\$2,000	\$1,000	\$1,000
A	\$					
B		\$		\$	\$	\$
C	\$	\$				\$
D	\$	\$				\$
I			\$			
E	\$					
F			\$			
G	\$			\$		\$
J						
K						
L						
M						
N						
H						
O						

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Results

- Definitive List of Project Portfolio
- Monthly Assessment of Project Health
- Quarterly Assessment of Portfolio

NEXT STEPS

- Completion of Governance Model
- Phase II - Production Systems Portfolio
- Link to Resource Management, Project Management, and Succession Planning